

FORVIS™

Signs You've Outgrown QuickBooks

May 3, 2023

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Housekeeping Items

- ✓ Please use the Questions feature to ask questions
- ✓ All attendees will remain muted
- ✓ You will receive a copy of the slides & recording
- ✓ Please take a few moments to complete our survey at the end of the webinar!

Watch for an email with the link

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About FORVIS

Services

- Assurance
- Tax
- Advisory

FORVIS, LLP ranks among the nation's top 10 public accounting firms, helping unlock the potential of our clients, people, and communities. We deliver an **Unmatched Client Experience™** with assurance, tax, and advisory services that reflect our exceptional capabilities and uncommon commitment to excellence. Discover how our forward vision can help you prepare for what's next.



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Business Technology Solutions

FORVIS Business Technology Solutions supports strategic business planning, process definition, & technology solutions to help advance your business.

Microsoft
Dynamics 365
CRM

Microsoft
Dynamics 365
ERP

Sage

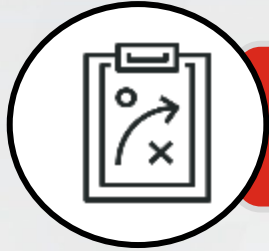
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Salesforce

Insights &
Automation

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FORVIS Business Technology Solutions Offerings



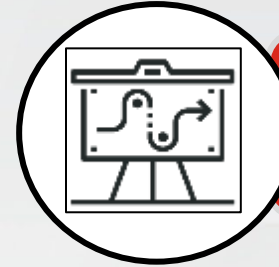
Digital Transformation Strategy

Technology Vision & Execution

- Current/Future State Business & IT Review
- Solution Assessment, Selection, & Licensing
- Execution Planning

Existing Solution Analysis & Recommendations

- Project Rescues
- Migrations/Upgrades
- Optimization/User Adoption



Digital Transformation Execution

Solution Execution

- Business Process Optimization
- Platform Selection
- Design, Build, & Support
- Supply Chain Optimization
- Sales & Marketing Optimization
- System Integrations
- Upgrades & Migrations
- Business Intelligence & Analytics

Project Management

- Project Monitoring & Controlling
- Project Audit & Stabilization

Organizational Change Management

- Transition Readiness
- Change Management
- End User & Administrator Training
- Post-Implementation Support

Today's Presenters

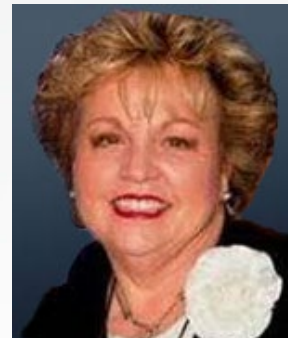
WEBINAR



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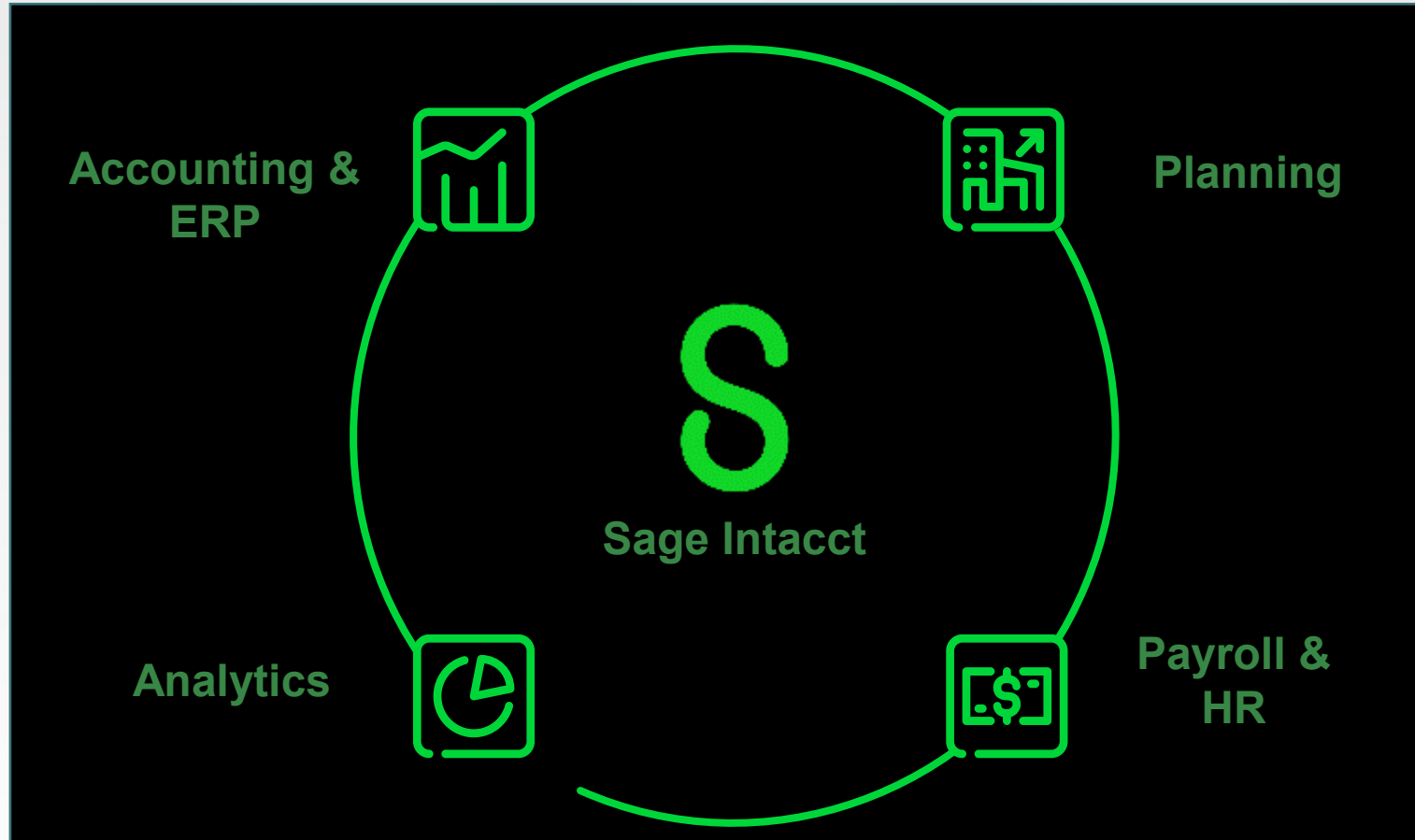
Linda Pinion

Principal Solution Consultant at
Sage Intacct, Inc.

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A Unified Approach to Simplify Business Processes



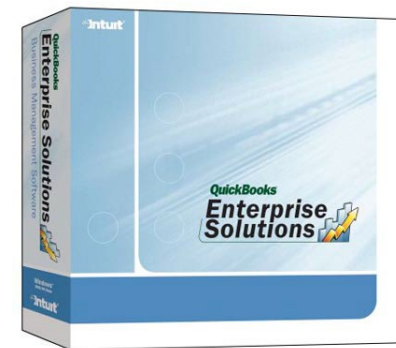
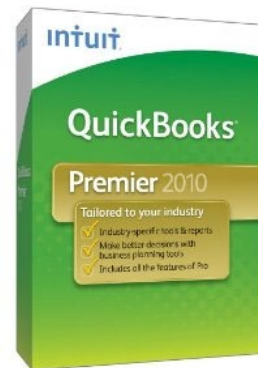
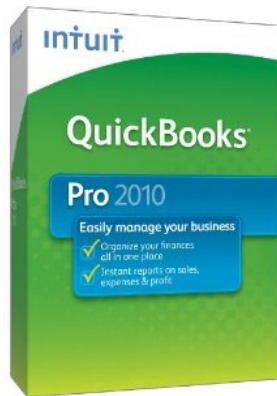
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Learning Objectives

- Identify key signs to evaluate if QuickBooks financial software is meeting your current & future needs
- Explain how to replace Excel-based processes with real-time, custom reports & dashboards
- Explain how to achieve anytime, anywhere access to financial information with Sage Intacct

Signs You May Be Outgrowing QuickBooks

QuickBooks can be a great tool for many small businesses



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But Small Businesses Can Become Big Businesses ...

Growth = Transition Challenges

- Lack of reporting & real-time business visibility
- Lack of scalability, e.g., users, entities, & data
- Lack of required accounting functionality
- Lack of integration to other business systems
- Over-reliance on manual processes & spreadsheets
- Increased risks around security, financial controls, auditability
- Lack of remote user access
- Extended month-end close times
- Reduced staff productivity

Top Reasons for Migrating from QuickBooks

A Need For

Real-Time Visibility & Business Insights

- 24/7 remote access for all stakeholders

Sophisticated, Robust Financials

- Additional functionality, e.g., Revenue Management, Multi-entity, etc.
- Security & auditability
- GAAP, IFRS, etc. compliance

Flexibility & Control

- Automated, flexible processes
- Deep integration to other business systems

Scalability

- Cost effectively scale & adapt to business needs
- Concurrent, distributed use
- Large data files (customers, vendors, employees, etc.)
- System performance & reliability

Introducing Sage Intacct

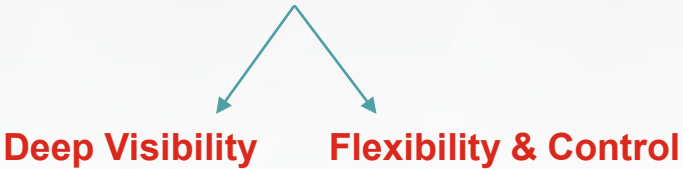
Since we are into financials, let's do a little math ...



**Best-in-Class
(Cloud) Financials**

**Superior
ROI**

**YOUR
SATISFACTION**



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Multi-Company Financials

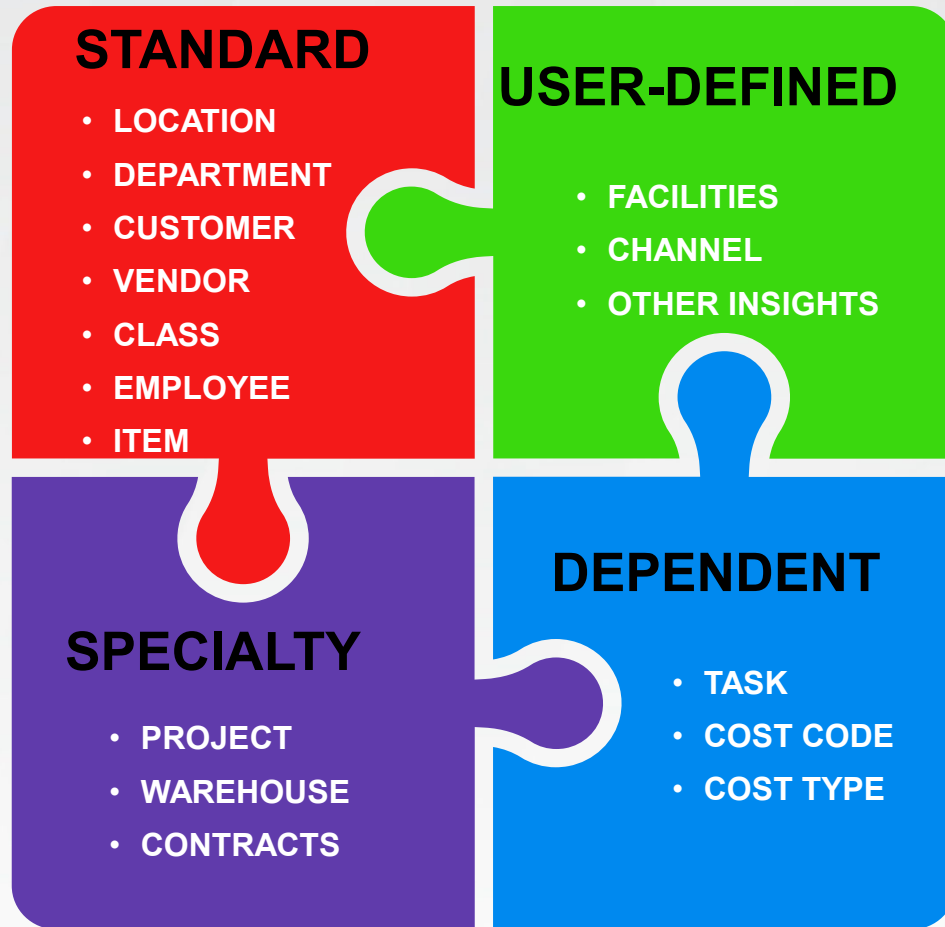
- Native Cloud from the first line of code
- Deep multidimensional accounting & automation for efficient financial operations
- Sophisticated visibility for real-time decision making
- Best-in-class, easy integration to other solutions
- Fresh & modern user interface
- Designed for CFOs & professional finance teams looking for a powerful solution



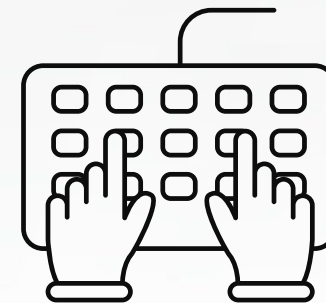
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Dimensions Are a Difference Maker



Data entry is greatly enhanced by using **independent dimensions** versus a segmented string of account numbers because you get the **freedom** of separate lists, but you can still enforce data **integrity** through relationships.



What You'll See Today

- **Visibility**

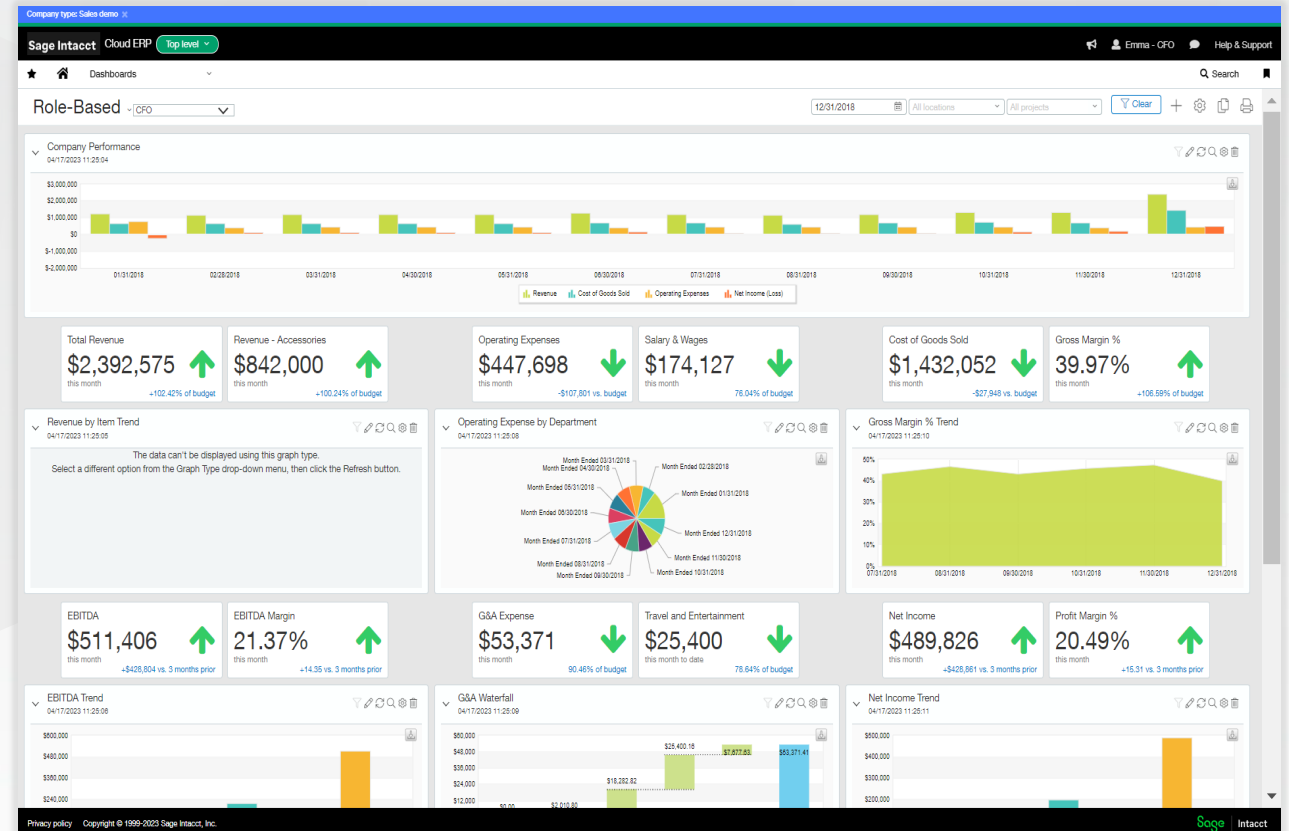
- Real-time, multidimensional dashboards, reporting, & analytics
- Combining financial & non-financial data

- **Flexibility**

- Simple, straightforward, & easy to transition from QuickBooks
- Built-in best practices that adapt to your business as you grow

- **Automation**

- Workflow & approval routings
- Automated process flows that match the way you do business



Critically-Acclaimed Cloud Accounting

Recognized by analysts

Did you know that **Sage Intacct** has been ranked #1 in Customer Satisfaction by **G2** for **9 years in a row**... and our customer reviews have earned Sage Intacct **over 100 awards**? This is what it means to be **trusted**.



*Gartner, Inc., "Critical Capabilities for Cloud Core Financial Management Suites for Midsize, Large, and Global Enterprises"; Robert Anderson, John Van Decker, Greg Leiter; May 11, 2021 (ID: G00733936) (In the 2017 report Sage Intacct was recognized as "Intacct")

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Let's Take a Closer Look ...



Q&A

Use the Q&A tool to submit any questions you may have

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